

Directions: Please complete shaded areas below.

Department Name: Department of Procurement

Project Name: EDMS

Project Amount: \$278,300

Preparer Name & Contact Information:

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Project Type: Please check (✓) one.

☐ Enterprise ☐ Communities of Interest ☒ Department Specific

Funding Source: Please check (✓) one.

☒ GF Capital ☐ Proprietary Capital

☐ **Mandated Requirement**
(If checked (✓), please indicate who is mandating this request as well as the time frame)

Department Priority of Initiative (1, 2, 3, etc.)

Section A

Background:

Provide any relevant background information to include existing investments in the proposed project. If applicable, please include any information explaining why this is a mandated project.

The Department of Procurement Management currently maintains approximately 1500 active contract files. Portions of the contract files are maintained in an electronic version or paper copy. Electronic versions are either on a DPM Agent's computer hard drive or on the network server that may only be accessible by the specific Agent. Information maintained on paper can be found in a centralized file system or may be located in the DPM Agent's file cabinet.

Requests are made frequently from Departments, vendors, or other DPM staff regarding information pertaining to a contract file. A substantial amount of time is required by the Agent responsible for the contract or others to research and respond to requests. In many instances the DPM Procurement Agent makes copies of the documents and either mails, faxes, or scans the information to respond in email.

If the agent does not re-file the paper document properly or keeps the file for an extended period of time, the paper file information is not available to anyone else in DPM to respond to a question. This causes inefficiencies, and delays, and additional work for DPM.

Problem Statement:

Define the problem, need, or opportunity.

Departments, vendors, and citizens spend time documenting or speaking with DPM agents regarding their request for information. 9 out of 10 questions asked could be answered by having information categorized and accessible via the Internet. This would significantly reduce frustration by departments, vendors and citizens for obtaining immediate answers to questions and DPM staff time tracking folders, shifting through paper documents, and typing, copying or scanning information to respond to questions.

Additionally requests from the BCC, County Manager's office or other sources for information pertaining to vendor applications cannot be easily responded to due the volume of vendor registrations and lack of ability to track information and requests. Paper documents are filed and stored and due to space limitations may be located in warehouse storage.

Solution:

What is the proposed solution?

DPM would like to engage in the use of EDMS, the electronic document management system for managing / replacing the paper vendor registration information and contract files, as well as develop internal and external access to information as appropriate. The application would provide department and public access to procurement information through the Internet. The proposed solution has several objectives that can be met with a successful implementation. These objectives include:

- Eliminates the need to store on paper most of the contract information, for DPM contracts. Remaining paper portions of the contract should be only limited to items requiring signatures and notarization.
- Provides easy access to all DPM vendor registration and contract information on the County's Intranet/Internet thus allowing all County Departments to have the same level of access to DPM contract information and public access to appropriate contract information. Departments and citizens will be able to find information 24 hours per day.
- Provides ability to search using multiple criteria, such as: contract number, vendor number, vendor name, Doing Business As (DBA), contract name, effective date, commodity code, commodity name, department and award sheet.
- Provides process to populate all DPM contracts into the new system, by agents, without requiring the scanning of paper documents.
- Provides process to scan paper documents when only a paper copy is available.
- Provides process to search for contracts via the Internet.

The initial scope of this request is limited to implementing the scanning and storage of documents from a project start date forward for new contracts. It doesn't include scanning old contract files. It also takes into consideration the original agreement made with DPM when EDMS was brought into the County that some DASD and county consulting services would be provided at no additional cost to DPM.

The effort plans for acquiring technical assistance in evaluating how existing DPM eProcurement applications can be modified to store and use information in EDMS, as well as converting existing eProcurement documents to EDMS. This process would eventually replace the need for storage of documents that are Internet and Intranet accessible.

Expected Benefits / Direct Payback:

State the benefits of solving the problem or reaching the goal. Hints: "How the project will reduce costs (perhaps from reducing redundant tasks such as data entry), better decision making at each step of a process (perhaps due to more accurate and timely information), or improved efficiency (thanks to fewer steps to process a transaction).

Specify collective benefits and identify benefits that are specific to each stakeholder. Wherever there are metrics (numbers or targets) for improvement, be sure to include them. Examples: "Reduce communications costs by 20%" or "Increase revenues by \$1,340,500 in fiscal year 2007."

- Reduction of long-term paper retention. GSA currently provides record retention storage for DPM achieve contract files. There is a direct charge to DPM for this service. Implementing EDMS in DPM will drastically reduce and possibly eliminate in the future the need for paper retention. This will be passed on in savings to the County by requiring less storage space from GSA.
- Savings will be achieved in reduction of time locating files in Agents' offices, shifting through paper documents to research an answer to respond to questions, and delays in pulling records from achieve. The anticipated savings in staff time will be reallocated to more productive support of procurement operations.
- Resources would be required to scan documents. These resources would be provided through outsourcing or from an additional staff resource (one FTE estimated at \$42,700).